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ABSTRACT

For productive follow-up of meetings and seminars, an executive summary can be invaluable. Such a post-meeting synopsis enables leaders to reinforce important meeting content which can lead to greater productivity for the participants. Strategies for creating and using an executive summary include: (1) selecting a summarizer to write down and later evaluate the proceedings, (2) tape recording the meeting, (3) saving charts, (4) questioning attendees, (5) transcribing only critical data rather than whole meetings, (6) synthesizing information clearly and concisely, (7) assessing and summarizing feedback from post-meeting evaluation forms, (8) publishing executive summaries in company journals or newsletters, (9) building an index system for filing meeting summaries, and (10) making use of expertise collected in the archives of meeting summaries for further use. (LH)

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TRAINING

AFTER THE MEETING, THEN WHAT?

BY OSWALD M.T. RATTERAY

Mary is uneasy, even though the participants in her seminar this morning seemed invigorated by the ideas and discussion. The problem is that after reviewing her meeting notes and those of her staff, Mary isn't sure how much anyone really gained from the meeting.

The notes are a mishmash of observations, unresolved questions, redundant assessments, and some important ideas that were never fully developed. Mary wonders exactly what has been accomplished and how she can build on the experience for the benefit of participants.

Mary's situation is familiar to many workshop leaders and seminar planners—anyone, in fact, who's concerned with a meeting's productive "afterlife."

Much has been written about how to plan and manage meetings, but very little about how to follow them up in a way that will increase the useful life of the ideas, skills, or conclusions formed in those meetings. For productive follow-up, an executive summary can be invaluable. This is a post-meeting synopsis that systematically helps sort the wheat from the chaff. It enables you to reinforce important meeting content, which can lead to greater productivity for the participants.

Here are some strategies for creating and using an executive summary:

Before the Meeting

• ***Select a summarizer.*** This person attends the session to write down and, later, help evaluate the events and discussions. In the past, you may have asked your staff to keep notes, but very often they became involved in the discussion of the issues, too. Their notes were probably sketchy because of this. Choose someone who is unlikely to become involved in the meeting's controversies, although you still need an articulate person with good language skills. Perhaps you have an experienced writer in the ranks, or maybe a talented person who can be trained. If not, consider hiring a consultant to summarize the meeting for you.

During the Meeting

• ***Record the meeting.*** Use your audiovisual staff, an outside recording firm, or have your summarizer operate a tape recorder. Don't believe that people are intimidated by the presence of a microphone. If your meeting is dynamic they will soon forget the equipment. When they know *why* it's there, they'll talk "for the record" as much as to each other. Make it known that your policy is to erase the tapes as soon as the information you need is extracted.

• ***Save charts.*** Many worthwhile sketches on blackboards and pads get lost forever. Have the summarizer copy them to illustrate the summary. With some refinement, they may be appropriate for use in a totally different report.

• ***Ask questions.*** There's more to asking questions than just verifying whether attendees understand what is being said. Ask for their solutions and opinions. You may be surprised when they're all compiled later.

After the meeting

• ***Selectively transcribe.*** Trying to type up the whole meeting is a waste of time and paper. Using his or her meeting notes as a guide, the summarizer can listen to the cassette recording and extract answers to new questions, develop critical data not on the handout sheets, and flesh out references to resources that people vaguely recalled during the meeting.

• ***Synthesize information.*** This is a critical step. Have the summarizer organize under topic headings what was said during the scattered discussions, then write a clear, concise digest of each section. You may want to highlight only the new information gained in the session, or else to fuse it with the old. In either case, the easier the material is to grasp, the more valuable it will be to participants.

• ***Assess feedback.*** Let your summarizer study any post-meeting evaluation forms you collect. Comments can be summarized and attached to the executive summary, or they just may serve to spark the summarizer's memory of something that happened at the meeting.

• ***Get the word out.*** Publish your executive summary in the company's journal or newsletter, or in briefing papers, fact sheets or flyers. (Pamphleteering is not a dead art!) It will give participants complete information in its proper perspective—something you may not have been able to do while standing on your feet at the meeting. Publishing the summary is even more important for meetings of large groups, because everyone does not always attend all of the sessions.

• ***Build indexes.*** As your file of meeting summaries grows, start an index system that cross references all the topic headings. This will make it easy to go back and pick out related information for later meetings. When meetings are in the same subject area, your summarizer can prepare wall charts that compare the substance of one meeting with another. Sometimes you can detect patterns that deserve extra attention.

• ***Exploit your archives.*** The expertise collected in your file of meeting summaries can form the basis of future training courses or workshops, such as "Tried-and-True Management Methods." Also, if yours is a membership organization, you might provide the material in the form of cassette seminars, which could generate extra income.

These techniques for creating and using executive summaries will keep you ahead of less thorough competition, and will help you gauge just how productive your meetings have been. Unlike Mary, you won't be left wondering. ■

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